

Partner selection or transition and exit strategies



Partnerships in Practice Tool

Partner selection processes and transition and exit strategies are two key areas of partnership practice that need careful thought, planning and implementation. This tool provides a structure to look carefully at both based on the guidance in the *Partnership Toolkit* and the *Guidelines on finance partnerships*.

1. Partner selection processes

WaterAid's strategy has a focus on systems strengthening for sustainable and equitable water, sanitation and hygiene (WASH). It also focuses on integrating WASH with other development areas such as health, education, gender, addressing inequalities and climate.

WaterAid's portfolio of partners needs to help to meet these aims. Hence, having a clear process to select partners that can support WaterAid's vision is vital.

Some teams already have consistent and clear processes in place. This exercise is helpful for creating or enhancing existing partner selection processes.

2. Transition and exit strategies

This area is often a challenge for organisations, like WaterAid, who work with partners.

- What is the process for transitioning relationships or exiting from partnerships that are no longer fit for purpose?
- Will some of the existing partnerships shift their focus in light of a changing strategy?
- How can less relevant partnerships be ended?
- Does the current guidance on transition and exit strategies need revising? This exercise is helpful for Country Programmes/ teams to design the process for transition and exit.

These exercises are less structured and more generative (and challenging) than the first four tools. The results should be practical and applicable for using across your Country Programme or team for any partner selection or partner transition/exit process in the future.



1 Partner selection processes

2 Transition and exit strategies



Tool purpose

To revise (or devise) a clear process for partner selection.

To revise (or devise) clear and simple partnership transition and exit strategies.



Partnership message

Working with the 'right' partners to achieve mutual goals requires clear and consistent partner selection processes.

Partnerships should 'start with the end in mind'. Ideally, partners should have a process in place for ending a partnership before fully entering into the relationship.



Practice message

To achieve our aims, it is vital to work with partners (of any nature) that understand WaterAid's aims and share a similar vision. This may mean collaborating with new and different partners and ensuring all parties' capacities and skills are maximised.

In order to manage partnerships effectively from start to finish, it is vital to develop (preferably in collaboration with all parties involved) and understand the processes for transitioning relationships from one sort to another, and to know when and how to exit a relationship.



Materials

- Large sheets of paper (e.g. flipchart)
- Coloured pens
- A digital camera (optional)

References and tools

For further guidance on partnership basics, please see:

- [WaterAid's Partnership Toolkit](#)
- [WaterAid's Guidelines on finance partnerships](#)

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Practical activity 1: Partner selection processes

This exercise is helpful for creating or enhancing existing partner selection processes. This exercise can be undertaken with or without partners, depending on your context and current relationship with your partners. The key steps for this activity are:

1. Please read the current guidance on the partner selection process in the *Partnership Toolkit* and the *Guidelines on finance partnerships*. Please familiarise yourself with the three phases of partner selection: starting from the sourcing of partners (**looking for partner**), assessment and checks (**courting**), through to agreements and planning (**tying the knot**).
2. Using this partner selection process and any existing Country Programme/departmental processes for sourcing partners in your context, discuss the following questions with your colleagues and complete the table.

Three phases of partner selection	Process (current or required)	What tools are needed?	Who is involved in this process?
<p>How do you source partners to meet your strategic objectives? For example:</p> <ul style="list-style-type: none"> ● For service delivery ● For generating evidence for influencing ● For advocacy ● For influencing other sectors ● For challenging inequalities 	(Respond to the questions on the left in this column.)		
How do you 'court' partners?	(Respond to the question on the left in this column.)		
How do you 'tie the knot' with partners?	(Respond to the question on the left in this column.)		

The discussions should generate some practical ideas for making systematic changes to partnership practices and procedures. Consider how your Country Programme/department/team could prioritise and make these changes.

Practical activity 2: Transition and exit strategies

This exercise is helpful for Country Programmes/teams to design the process to transition and exit from a partnership. This exercise can be undertaken with or without partners, depending on your context and current relationship with your partners. The key steps for this activity are:

1. Please read the current guidance on transition and exit strategies in WaterAid's *Partnership Toolkit* and the *Guidelines on finance partnerships*.
2. Using this transition and exit strategies guidance and any existing Country Programme/departmental procedures for transitioning/ending relationships with partners in your context, discuss the following questions with your colleagues and formulate your response as guidance notes or a check-list which could ultimately form a standard 'strategy'. The aim of the exercise is to think through and design the generic process of a transition/exit strategy – so that the same process could be discussed with partners at the start of a relationship and used in any future Project Partnership Agreement/Memorandum of Understanding, which is then tailored for the context.

Tip: If you are undertaking this exercise with partners in a particular relationship, you could design the generic process first and then tailor it to that specific partnership context – thereby designing a real, useable strategy that could be incorporated into a specific Project Partnership Agreement or Memorandum of Understanding.

Decision-making	Communications	Process of transition
What are the criteria that would bring about transition or exit? (e.g. unable to scale-up, no influence potential, change in geographical location, change in strategic focus and therefore intended joint outcome, etc.)	Who communicates what to partners and how? (e.g. should formal communications always be followed up by personal communication?)	What are the steps each party will take towards transition/exit? In terms of making changes to or withdrawing from: 1) The project/programme/activity; 2) The partnership.
What is the process of decision-making? (i.e. who can take what decision and when? Do all parties agree? How are decisions recorded?)	Where do discussions take place? (i.e. in what forum – at a regular meeting or a special one).	What resources will be required? (i.e. finance levels, time, buy-in, people).
What is the required level of authority/approval process required for making the decision?	What communications methods/media are used?	Do you need a sustainability plan?
What evidence could be used to back up decisions? (e.g. project evaluations, partner reviews, etc.)	When does the transition/exit communication start? What is the anticipated timescale?	What happens to any shared asset? (i.e. what is the asset management plan?)
What dispute or grievance mechanism is used?	What communications' principles and/or behaviours should be shown by all parties involved?	

3. Discuss how the transition/exit strategy should be reviewed and the frequency of that review. For example, is this something that is discussed with partners on an annual basis to ensure it remains fit for purpose? Are there other questions that need to be answered in your context?